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Poultry Programs

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Croatia

Poultry is one of the few agricultural sectors in Croatia where production exceeds domestic demand and exports exceed imports. Croatia produces 107 percent of its poultry meat needs and 102 percent of domestic egg needs.

There is negligible domestic production of mechanically deboned meat (MDM). In 2001 the value of MDM was over \$3 million. CY 2001 imports from the United States were \$260,000 but in 2002 imports dropped to zero. Croatian meat processing companies have started exporting to the EU and now by MDM only from EU approved plants and supplying countries, thereby shutting out U.S. firms.

Top Ten Suppliers of MDM to Croatia

	1998		1999		2000		2001	
	Qty	Val	Qty	Val	Qty	Val	Qty	Val
Netherlands	191	136	166	122	250	162	399	1,047
Germany	0	0	0	0	190	201	777	517
France	311	295	106	80	243	257	551	512
Belgium	0	0	0	0	5	4	781	451
China	117	269	639	1,555	117	284	146	362
U.S.	18	10	21	14	0	0	368	260
Italy	40	40	0	0	0	0	152	102
Argentina	0	0	0	0	0	0	14	46
Spain	0	0	0	0	0	0	21	17
Ireland	0	0	0	0	0	0	1	6
Other	202	220	145	118	137	96	190	174
World	839	930	1,077	1,887	942	1,006	3,212	3,322

Annual production of poultry meat is about 90,645 MT and 915,198,000 eggs. Total consumption is about 85,000MT for poultry meat and 900 million for eggs. The 2005 forecast for total Croatian poultry meat consumption is between 100,000MT and 120,000MT of poultry meat and 931 to 944 million eggs.

Source: USDA/FAS

Japan's Import of Frozen Egg Products

	Frozen Eggs	Whole Yolks	Frozen Albumen	Frozen Total
2001				
September	143.8	878.1	42.3	973.2
October	164.2	1,030.4	78.4	1,273.0
November	261.2	904.1	135.2	1,348.5
2001 To-Date	2,042.2	10,872.3	2,068.7	14,940.2
2002				
September	226.8	1,430.4	18.1	1,675.3
October	310.6	579.0	18.1	907.7
November	252.6	1,389.5	0.0	1,642.1
2002 To-Date	2,729.5	11,153.0	356.3	14,238.8

Source: ALIC

U.S. Exports of Poultry Meat , January Comparisons

	2002 Volume	2003 Volume	2002 Value	2003 Value
China	1,572.9	8,640.2	1,008	3,704
Hong Kong	17,183.3	21,734.2	12,043	12,393
Korea	13,291.9	12,874.5	9,678	7,293
Mexico	24,194.6	17,855.7	14,484	13,909
Russia	103,808.0	51,087.8	63,380	21,462

volume in metric tons, value in thousand dollars

Source: USDA/FAS

Poultry World Markets and Trade

Total broiler meat exports in 2003 for major exporting countries are forecast at 5.7 million tons, less than a 1 percent decrease from the 2002 level. A large factor is Russia's restrictions on poultry imports. As a result of the new quota, world broiler meat imports for major countries will fall by about 2 percent from the 2002 level, and competition in other markets among the major exporting countries is expected to stiffen. Russia is the world's largest poultry importer.

Projected broiler meat trade in million metric tons

Key Exporters			Key Importers		
	Vol	% chg		Vol	% chg
US	2.3	7	China	0.4	-9
Brazil	1.55	-2	EU	0.39	-5
EU	0.72	-15	Hong Kong	0.21	-8
Thailand	0.48	3	Japan	0.76	2
			Mexico	0.275	4
			Russia	1.125	-7

Exporters Growth in U.S. exports is expected to remain strong due to demand from traditional markets in Asia and the Americas. Brazil's decrease in exports is mainly attributed to limited access to the Russian markets caused by Russia's quota. Brazil was allocated 33,000 tons of the Russian poultry import quota for May-December 2003, only 11 percent of what Brazil exported to Russia in 2002. Sanitary concerns will also challenge Brazil's exports in 2003.

In the EU, an outbreak of high pathogenic Avian Influenza in the Netherlands will be the largest factor in reduced poultry exports. The Netherlands accounts for 29 percent of EU broiler exports to the world. Thailand's exports should remain strong due to strong further processed products exports to Japan and the EU.

Importers In China, gains in domestic production will displace imports. The EU made changes to tariff regulations on salted poultry meat in 2002 which decreased imports from Brazil and Thailand. Hong Kong is projected to have an increased demand for chilled chicken from China in 2003. Japan's increase will be due to expected strong imports of further processed product. Mexican imports should increase due to the removal of tariff rate quotas and tariffs on products except leg quarters, thighs and drumsticks.

Source: USDA/FAS

Inspected Egg Products-U.S. & Canada Export/Import Trade**U.S. Exports to Canada, in Pounds (000) (Preliminary)**

Week Ending March 15, 2003		Year-To-Date	
	2003	2002/1	2003
Liquid	154	300	1,927
Frozen	0	0	0
Dried	51	0	135
Total	205	300	2,062

U.S. Imports From Canada, in Pounds (000) (Preliminary)

Week Ending March 15, 2003		Year-To-Date	
	2003	2002/1	2003
Liquid	49	80	1,309
Frozen	198	117	923
Dried	40	159	87
Total	287	356	2,319

Inspected Shell Eggs**U.S Exports To Canada, In 30-Dozen Cases (Preliminary)**

Week Ending March 15, 2003		Year-To-Date	
	2003	2002 /1	2003
Jumbo	0	173	0
Extra Large	30	780	180
Large	30	641	5,233
Medium	3,120	1,437	8,884
Ungraded	0	0	1,470
Misc	660	60	1,392
Total	3,840	3,091	17,159

/1 Comparable Week, to-date figures may not total due to rounding.

Source: USDA/AMS Poultry Programs, Market News Branch in cooperation with Agriculture Canada, Poultry Development Division.

LIVE POULTRY SLTRD UNDER INSPECTION W/E 15-Mar-03
(PRELIMINARY)**U.S. FOWL SLAUGHTERED DOMESTICALLY**

	LIGHT HENS	HEAVY HENS	TTL HENS
	THOUSANDS		
HEAD	1,558	1,356	2,914
LAST WEEK	1,465	1,255	2,720
SAME WEEK YR AGO	1,636	1,363	2,999
TO-DATE/2003	17,806	14,771	32,577
TO-DATE/2002	19,530	14,148	33,678

	LIGHT HENS	HEAVY HENS	TTL HENS
	THOUSANDS		
HEAD	190	3	193
LAST WEEK	221	0	221
SAME WEEK YR AGO	258	0	258
TO-DATE/2003	3,513	53	3,566
TO-DATE/2002	3,993	20	4,013

SOURCE: AGRICULTURE CANADA, PLTRY DEVELOPMENT DIV.

TOTAL U.S. FOWL SLAUGHTERED IN THE U.S. AND CANADA

	LIGHT HENS	HEAVY HENS	TTL HENS
HEAD	1,748	1,359	3,107
LAST WEEK	1,686	1,255	2,941
SAME WEEK YR AGO	1,894	1,363	3,257
TO-DATE/2003	21,319	14,824	36,143
TO-DATE/2002	23,523	14,168	37,691

SOURCE: USDA/AMS PLTRY PROGRAMS, MRKT NEWS BR.

CENTRAL REGION MECHANICALLY SEPARATED CHICKEN

F.O.B. SHIPPER DOCK OR EQUIVALENT, PRICES NEGOTIATED FOR MECHANICALLY SEPARATED CHICKEN IN THE CENTRAL REGION IN TRUCKLOT AND LESS THAN TRUCKLOT VOLUMES, CENTS PER POUND, DELIVERY WITHIN TWO WEEKS.

		21-MAR-2003	
		PRICES	VOLUME
		(Cents per Pound)	

FAT CONTENT	FROZEN	FRESH	TOTAL	EXPORT
15% OR LESS				
RANGE	-	-	-	-
WTD AVERAGE				

CHICKEN, WITH SKIN ADDED

		21-MAR-2003	
		PRICES	VOLUME
		(Cents per Pound)	

FAT CONTENT	FROZEN	FRESH	TOTAL	EXPORT
15% OR LESS				
RANGE	-	17.00	81,600	-
WTD AVERAGE		17.00		
15-20%				
RANGE	12.00-16.50	11.00-16.00	1,856,400	571,200
WTD AVERAGE	14.11	13.11		
20% OR MORE				
RANGE	-	11.00	32,000	-
WTD AVERAGE		11.00		

* INCLUDES THE STATES of AL, AR, IA, IL, IN, KS, KY, LA, MI, MN, MO, MS, ND, NE, OK, OH, SD, TN, TX, WI

EASTERN REGION MECHANICALLY SEPARATED CHICKEN

F.O.B. SHIPPER DOCK OR EQUIVALENT, PRICES NEGOTIATED FOR MECHANICALLY SEPARATED CHICKEN IN THE EASTERN REGION IN TRUCKLOT AND LESS THAN TRUCKLOT VOLUMES, CENTS PER POUND, DELIVERY WITHIN TWO WEEKS.

		21-MAR-2003	
		PRICES	VOLUME
		(Cents per Pound)	

FAT CONTENT	FROZEN	FRESH	TOTAL	EXPORT
15% OR LESS				
RANGE	-	-	-	-
WTD AVERAGE				

CHICKEN, WITH SKIN ADDED

		21-MAR-2003	
		PRICES	VOLUME
		(Cents per Pound)	

FAT CONTENT	FROZEN	FRESH	TOTAL	EXPORT
15% OR LESS				
RANGE	15.00-17.00	15.00-16.00	996,000	686,000
WTD AVERAGE	16.03	15.50		
15-20%				
RANGE	13.50-18.00	11.00-15.00	1,831,000	104,000
WTD AVERAGE	14.53	13.46		
20% OR MORE				
RANGE	-	11.50	120,000	-
WTD AVERAGE		11.50		

* INCLUDES THE STATES of CT, DE, FL, GA, MA, MD, ME, NC, NH, NJ, NY, PA, RI, SC, VA, VT, WV

NATIONAL YOUNG TURKEY PARTS AND BULK MEAT, FROZEN (UNLESS SPECIFIED), CENTS PER LB., DELIVERED FIRST RECEIVERS, PART AND FULL TRUCKLOTS AS OF 21 MARCH 2003.

The undertone on 4-8 lb. breasts was mostly steady with some spot weakness noted on Grade A packer labels, institutional sizes steady. Demand slow to moderate. Offerings available. The trade sentiment on bulk parts was steady to fully steady for the slow to instances moderate demand. Offerings were light to adequate and held with varied degrees of confidence. Increased activity was noted on frozen destrapped tenderloins at mostly steady price levels and on fresh destrapped tenderloins. Domestic trading centered on a moderate volume of Grade A 4-8 lb. breasts and on a fair volume of frozen destrapped tenderloins, balance light. Frozen breeder breast meat (-6 months age) 97.50, plant grade non-basted 10-16 lb. breasts 89 and plant grade basted 16-18 lb. breasts 94 cents delivered domestic. Export trading centered on a fair volume of frozen thigh meat, balance light. For export: frozen whole tenderloins 93 shipping point, hen necks 16 and fresh tom drums 21.50 cents delivered.

FRIDAY, MARCH 21, 2003**EXPORT TRADING**

	PRICE RANGE	L.S.T. CODE 1/	WTD AVG PRICE	VOLUME (000)	WEEKLY WTD AVG PRICE	WEEKLY VOLUME (000)
DRUMSTICKS, TOMS		R	23.00	80	23.07	280
WINGS FULL-CUT - TOMS	15.00-16.00		15.50	80	15.50	80
WINGS, V-TYPE, TOM		F	24.00	208		
TAILS	18.00		18.00	80	18.40	100
MECHANICALLY SEPARATED 2/	19.75		19.75	40	19.88	80
THIGH MEAT - FROZEN	45.00-51.50		48.80	408	49.11	1,182

THURSDAY, MARCH 20, 2003**EXPORT TRADING**

	PRICE RANGE	L.S.T. CODE 1/	WTD AVG PRICE	VOLUME (000)
DRUMSTICKS, TOMS	23.00		23.00	80
WINGS FULL-CUT - TOMS		F	15.50	208
WINGS, V-TYPE, TOM		F	24.00	208
TAILS		W	20.00	20
MECHANICALLY SEPARATED 2/	20.00		20.00	40
THIGH MEAT - FROZEN	49.00-52.00		50.58	304

WEDNESDAY, MARCH 19, 2003**EXPORT TRADING**

	PRICE RANGE	L.S.T. CODE 1/	WTD AVG PRICE	VOLUME (000)
DRUMSTICKS, TOMS	22.50		22.50	120
WINGS FULL-CUT - TOMS		F	15.50	208
WINGS, V-TYPE, TOM		F	24.00	208
TAILS	20.00		20.00	20
MECHANICALLY SEPARATED 2/		W	19.17	48
THIGH MEAT - FROZEN	45.00-51.00		48.42	470

TUESDAY, MARCH 18, 2003**EXPORT TRADING**

	PRICE RANGE	L.S.T. CODE 1/	WTD AVG PRICE	VOLUME (000)
DRUMSTICKS, TOMS		M	24.00	80
WINGS FULL-CUT - TOMS		F	15.50	208
WINGS, V-TYPE, TOM		F	24.00	208
TAILS				
MECHANICALLY SEPARATED 2/		W	19.17	48
THIGH MEAT - FROZEN		F	52.00	80

MONDAY, MARCH 17, 2003**EXPORT TRADING**

	PRICE RANGE	L.S.T. CODE 1/	WTD AVG PRICE	VOLUME (000)
DRUMSTICKS, TOMS	24.00		24.00	80
WINGS FULL-CUT - TOMS		F	15.50	208
WINGS, V-TYPE, TOM		F	24.00	208
TAILS				
MECHANICALLY SEPARATED 2/		W	19.17	48
THIGH MEAT - FROZEN		F	52.00	80

1/ CODES FOR LAST SIGNIFICANT TRADE (L.S.T.): M=MONDAY T=TUESDAY W=WEDNESDAY R=THURSDAY F=FRIDAY

2/ Product contains 15-20% fat with skin added.